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Fall 2016

Sales Management Portal

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ABSTRACT

In this portal, we are designing a website for company's sales management. There are members like staff, clients and manager working in this portal. Firstly, we create a home page for the website, where the existing staff members and managers can Login to the page. It asks whether the user is a client or a prospect. If the user is not existing, then we give an option to add a new client. The new client's information redirects the page to client's information page, where it enters the client's information into a pipeline by keeping log of contacts and activities, opportunities and proposals, and projects. we provide a search engine where staff can find clients by names, either on complete or partial search. In addition, staff have a new feature of creating time sheets.

We provide a page for manager, where Managers can create user accounts, view and update entries, leave comments on entries, and send messages to staff. The new feature that we are adding for manager part is approving the time sheets. In manager's page, Managers are also being able to run various reports such as lists of prospects, reports of opportunities or proposals by dates, sales projections by month or by salesperson, project tracking.

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1 Project Description

This is a conceptual design for a company's sales pipeline database portal, at which sales staff enter clients' information into pipeline by keeping logs of contacts and activities, opportunities and proposals, and eventually projects. The portal enables management to oversee works and track progresses, and in the meantime to interact with and provide guidance to sales staff timely.

1.1 Competitive Information

Even this is same as some other companies but exactly they are no similar competitor. If we find any similar competitor we have the potential to overcome in the best way.

1.2 Relationship to Other Applications/Projects

For this project, we had find one relationship that was every are working on the sales, but everyone has they own way of design and different thoughts. So, for this reason I can say that there is no relationship in the projects.

1.3 Assumptions and Dependencies

- Depending on the time sheet we have created only few modules for the manager. In further, we can add additional features for the manager.
- We can also add the more features for the portal in all the modules which we have right now.

1.4 Future Enhancements

In future, we are trying to enhance our portal as the mobile app. The employees who are working can be able to use this application.

1.5 Terms and Acronyms

We have few acronyms which are used in the portal they are client, prospect, opportunity, proposal, staff and manager.

2 Project Technical Description

Project flow is limited to three major modules on upon the analysis of the abstract of the project

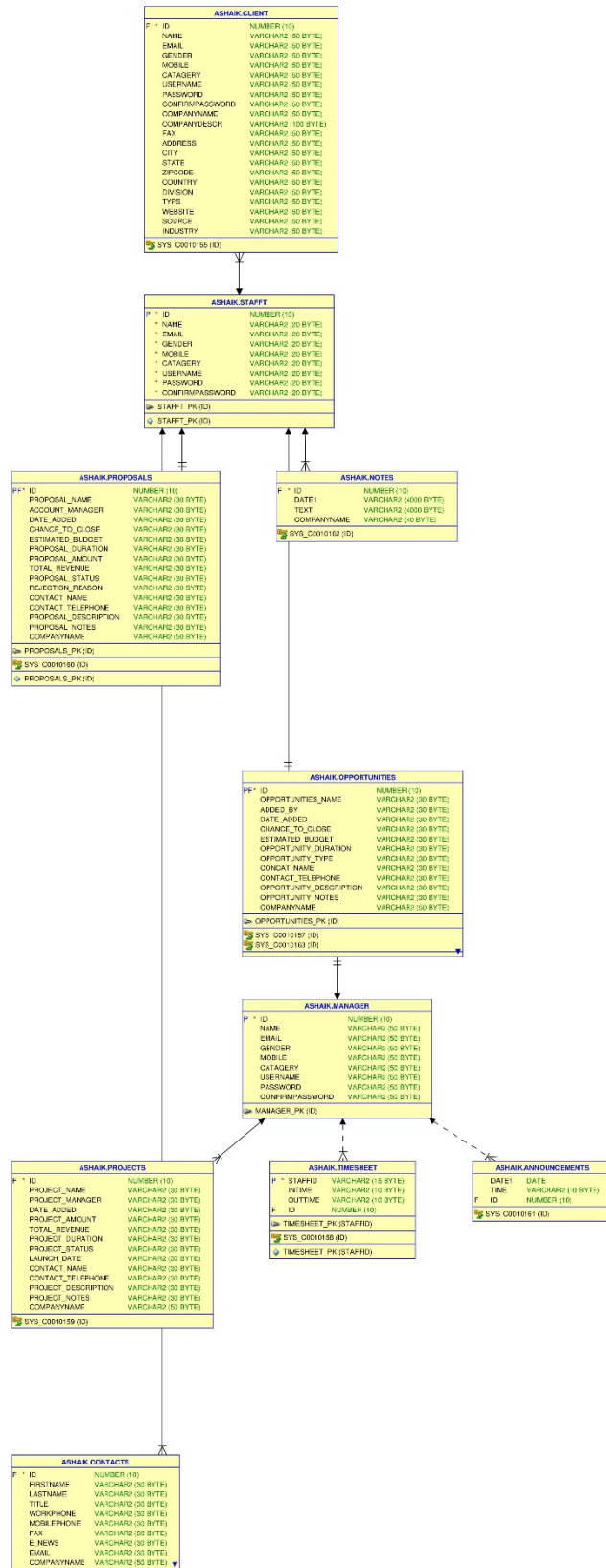
- Client

- Staff
- Manager

The technology that which is used for application possible are as follows

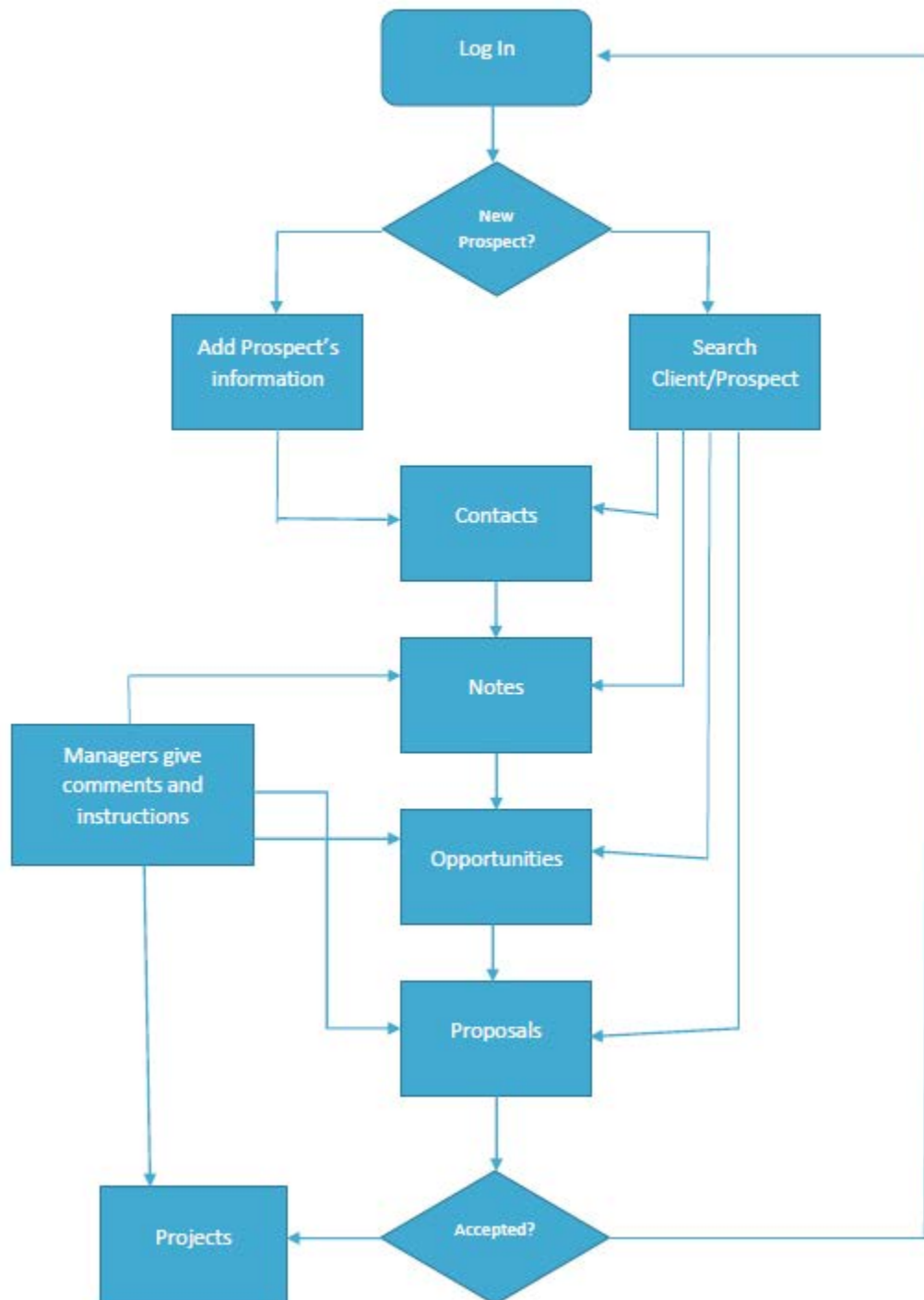
- HTML programing
- CSS styling
- User authenticate and authorization (using C#, ado dot net ,programming skills)
- SQL database and programming (used oracle 12 c as database)
- Site navigation (used asp.net server side programming)
- Application of state and sessions(To make identity though out the application)
- Validation controls (used asp validation controls to validate all client side validation)
- Test and debug (some kind of manual testing and unit testing debugging done at the time of development)

2.1 Application Architecture



2.2 Application Information flows

Process Flow Diagram of Sales Pipeline



2.3 Interactions with other Projects (if Any)

The project will not interact with any of the external Projects. Relational Database have their own different tables which play a key role in interacting with all other tables. Foreign keys being the main target to bring up data from all the databases which we will provided required access to pull the data from the database.

2.4 Interactions with other Applications

Interacting with other applications are not required in our project because we have the few social plug-ins except this we don't have any other interactions.

2.5 Capabilities

Our project has capable enough to add data in to data base and as well as retrieving the data. As the data whenever needed to be updated and at the same time it will automatically updated to database. We created our programs in such a way that they are capable enough to interact with them.

2.6 Risk Assessment and Management

There some risk factors that are associated with this project it was Maintenance of Data, quantity of data and usage of the data in a proper way are the main risk factors for any database. And we are using the oracle 12 c databases which was very difficult. A plan would be set up to control the data flow and proper measures should be initiated to have the data safe.

3 Project Requirements

3.1 Identification of Requirements

Each Entity has got its own Requirement and below are the features for each entity which we used

Implementation: Mandatory

<GSU-SalesManagementPortal_FA-2016 Staff -01>

This feature will help the staff add all details of the client which includes General Information, Contact Information, Notes, Opportunities, Proposal and Project Information. In this the staff, can be able to view the proposal that was made by the client and once he done with the review he can be able to pass this information to the manager.

<GSU-SalesManagementPortal_FA-2016 Staff -notes-01>

This feature will help the staff add all details of the client notes which includes General Information about the project, about meetings time and the meeting place.

<GSU-SalesManagementPortal_FA-2016 Staff -contacts -01>

This feature will help the staff add all details of the client contacts which includes General Information about the contacts details of the agent in between the client and the staff. The agent will be able to give the details of the client to the staff.

<GSU-SalesManagementPortal_FA-2016 Staff -General info-01>

This feature will help the staff add all details of the client which includes General Information about the clients like his name details of the proposal what they are going to give about the project.

<GSU-SalesManagementPortal_FA-2016 Staff-opportunities -01>

This feature will help the staff add all details of the client which includes Opportunities, in this we can be able to see the project estimation and the how much budget they have and more over to this we can view the opportunity description.

<GSU-SalesManagementPortal_FA-2016 Staff -proposal-01>

This feature will help the staff add all details of the client which includes Proposal, in this we can be to see the total revenue of the project, proposal status, and the date added. At the same time, we can be able to see the proposal duration and if it is rejected we can see the Rejection reason.

<GSU-SalesManagementPortal_FA-2016 Staff-Project -01>

This feature will help the manager add all details of the client which includes Project Information, in this table we can be able to see the project launch date of the project. It was little bit same as the proposal table but we have the few more in this table.

<GSU-SalesManagementPortal_FA-2016 Manager -01>

This feature will help the staff add all details of the staff and the client which includes Project Information, and the manager has the additional feature which as same as the staff. The manager has the feature to approve the project and view the project proposal.

<GSU-SalesManagementPortal_FA-2016 Clients -01>

This feature will help the clients add all details of the project which includes the contacts, notes, opportunities, proposal, and project.

<GSU-SalesManagementPortal_FA-2016 Clients-contacts -01>

This feature will help the clients add all details of the project which includes the contacts, the client contact details will present in this table.

<GSU-SalesManagementPortal_FA-2016 Clients-Notes -01>

This feature will help the clients add all details of the project which includes the notes of the project details, type of the project and budget.

<GSU-SalesManagementPortal_FA-2016 About us -01>

This feature will help the us to give the details of the portal and the description of the sales portal.

3.2 Database

3.2.1 Client

CLIENT x						
Columns Data Constraints Grants Statistics Triggers Flashback Dependencies Details Partitions Indexes SQL						
Actions...						
	COLUMN_NAME	DATA_TYPE	NULLABLE	DATA_DEFAULT	COLUMN_ID	COMMENTS
1	ID	NUMBER(10,0)	No	"ASHAIK"."ISEQ\$\$_92698".nextval	1	(null)
2	NAME	VARCHAR2(50 BYTE)	Yes	(null)	2	(null)
3	EMAIL	VARCHAR2(50 BYTE)	Yes	(null)	3	(null)
4	GENDER	VARCHAR2(50 BYTE)	Yes	(null)	4	(null)
5	MOBILE	VARCHAR2(50 BYTE)	Yes	(null)	5	(null)
6	CATAGERY	VARCHAR2(50 BYTE)	Yes	(null)	6	(null)
7	USERNAME	VARCHAR2(50 BYTE)	Yes	(null)	7	(null)
8	PASSWORD	VARCHAR2(50 BYTE)	Yes	(null)	8	(null)
9	CONFIRMPASSWORD	VARCHAR2(50 BYTE)	Yes	(null)	9	(null)
10	COMPANYNAME	VARCHAR2(50 BYTE)	Yes	(null)	10	(null)
11	COMPANYDESCR	VARCHAR2(100 BYTE)	Yes	(null)	11	(null)
12	FAX	VARCHAR2(50 BYTE)	Yes	(null)	12	(null)
13	ADDRESS	VARCHAR2(50 BYTE)	Yes	(null)	13	(null)
14	CITY	VARCHAR2(50 BYTE)	Yes	(null)	14	(null)
15	STATE	VARCHAR2(50 BYTE)	Yes	(null)	15	(null)
16	ZIPCODE	VARCHAR2(50 BYTE)	Yes	(null)	16	(null)
17	COUNTRY	VARCHAR2(50 BYTE)	Yes	(null)	17	(null)
18	DIVISION	VARCHAR2(50 BYTE)	Yes	(null)	18	(null)
19	TYPES	VARCHAR2(50 BYTE)	Yes	(null)	19	(null)
20	WEBSITE	VARCHAR2(50 BYTE)	Yes	(null)	20	(null)
21	SOURCE	VARCHAR2(50 BYTE)	Yes	(null)	21	(null)
22	INDUSTRY	VARCHAR2(50 BYTE)	Yes	(null)	22	(null)

3.2.2 Contacts

CONTACTS x						
Columns Data Constraints Grants Statistics Triggers Flashback Dependencies Details Partitions Indexes SQL						
Actions...						
	COLUMN_NAME	DATA_TYPE	NULLABLE	DATA_DEFAULT	COLUMN_ID	COMMENTS
1	ID	NUMBER(10,0)	No	"ASHAIK"."ISEQ\$\$_92821".nextval	1 (null)	
2	FIRSTNAME	VARCHAR2(30 BYTE)	Yes	(null)	2 (null)	
3	LASTNAME	VARCHAR2(30 BYTE)	Yes	(null)	3 (null)	
4	TITLE	VARCHAR2(30 BYTE)	Yes	(null)	4 (null)	
5	WORKPHONE	VARCHAR2(30 BYTE)	Yes	(null)	5 (null)	
6	MOBILEPHONE	VARCHAR2(30 BYTE)	Yes	(null)	6 (null)	
7	FAX	VARCHAR2(30 BYTE)	Yes	(null)	7 (null)	
8	E_NEWS	VARCHAR2(30 BYTE)	Yes	(null)	8 (null)	
9	EMAIL	VARCHAR2(30 BYTE)	Yes	(null)	9 (null)	
10	COMPANYNAME	VARCHAR2(50 BYTE)	Yes	(null)	10 (null)	

3.2.3 Opportunities

OPPORTUNITIES x						
Columns Data Constraints Grants Statistics Triggers Flashback Dependencies Details Partitions Indexes SQL						
Actions...						
	COLUMN_NAME	DATA_TYPE	NULLABLE	DATA_DEFAULT	COLUMN_ID	COMMENTS
1	ID	NUMBER(10,0)	No	"ASHAIK"."ISEQ\$\$_92681".nextval	1 (null)	
2	OPPORTUNITIES_NAME	VARCHAR2(30 BYTE)	Yes	(null)	2 (null)	
3	ADDED_BY	VARCHAR2(30 BYTE)	Yes	(null)	3 (null)	
4	DATE_ADDED	VARCHAR2(30 BYTE)	Yes	(null)	4 (null)	
5	CHANCE_TO_CLOSE	VARCHAR2(30 BYTE)	Yes	(null)	5 (null)	
6	ESTIMATED_BUDGET	VARCHAR2(30 BYTE)	Yes	(null)	6 (null)	
7	OPPORTUNITY_DURATION	VARCHAR2(30 BYTE)	Yes	(null)	7 (null)	
8	OPPORTUNITY_TYPE	VARCHAR2(30 BYTE)	Yes	(null)	8 (null)	
9	CONCAT_NAME	VARCHAR2(30 BYTE)	Yes	(null)	9 (null)	
10	CONTACT_TELEPHONE	VARCHAR2(30 BYTE)	Yes	(null)	10 (null)	
11	OPPORTUNITY_DESCRIPTION	VARCHAR2(30 BYTE)	Yes	(null)	11 (null)	
12	OPPORTUNITY_NOTES	VARCHAR2(30 BYTE)	Yes	(null)	12 (null)	
13	COMPANYNAME	VARCHAR2(50 BYTE)	Yes	(null)	13 (null)	

3.2.4 Manager

MANAGER x						
Columns Data Constraints Grants Statistics Triggers Flashback Dependencies Details Partitions Indexes SQL						
Actions...						
	COLUMN_NAME	DATA_TYPE	NULLABLE	DATA_DEFAULT	COLUMN_ID	COMMENTS
1	ID	NUMBER (10,0)	No	"ASHAIK"."ISEQ\$\$_92669".nextval	1	(null)
2	NAME	VARCHAR2 (50 BYTE)	Yes	(null)	2	(null)
3	EMAIL	VARCHAR2 (50 BYTE)	Yes	(null)	3	(null)
4	GENDER	VARCHAR2 (50 BYTE)	Yes	(null)	4	(null)
5	MOBILE	VARCHAR2 (50 BYTE)	Yes	(null)	5	(null)
6	CATAGERY	VARCHAR2 (50 BYTE)	Yes	(null)	6	(null)
7	USERNAME	VARCHAR2 (50 BYTE)	Yes	(null)	7	(null)
8	PASSWORD	VARCHAR2 (50 BYTE)	Yes	(null)	8	(null)
9	CONFIRMPASSWORD	VARCHAR2 (50 BYTE)	Yes	(null)	9	(null)

3.2.5 Notes

NOTES x						
Columns Data Constraints Grants Statistics Triggers Flashback Dependencies Details Partitions Indexes SQL						
Actions...						
	COLUMN_NAME	DATA_TYPE	NULLABLE	DATA_DEFAULT	COLUMN_ID	COMMENTS
1	ID	NUMBER (10,0)	No	"ASHAIK"."ISEQ\$\$_93470".nextval	1	(null)
2	DATE1	VARCHAR2 (4000 BYTE)	Yes	(null)	2	(null)
3	TEXT	VARCHAR2 (4000 BYTE)	Yes	(null)	3	(null)
4	COMPANYNAME	VARCHAR2 (40 BYTE)	Yes	(null)	4	(null)

3.2.6 Projects

PROJECTS x						
Columns Data Constraints Grants Statistics Triggers Flashback Dependencies Details Partitions Indexes SQL						
Actions...						
	COLUMN_NAME	DATA_TYPE	NULLABLE	DATA_DEFAULT	COLUMN_ID	COMMENTS
1	ID	NUMBER(10,0)	No	"ASHAIK"."ISEQ\$\$_92683".nextval	1	(null)
2	PROJECT_NAME	VARCHAR2(30 BYTE)	Yes	(null)	2	(null)
3	PROJECT_MANAGER	VARCHAR2(30 BYTE)	Yes	(null)	3	(null)
4	DATE_ADDED	VARCHAR2(30 BYTE)	Yes	(null)	4	(null)
5	PROJECT_AMOUNT	VARCHAR2(30 BYTE)	Yes	(null)	5	(null)
6	TOTAL_REVENUE	VARCHAR2(30 BYTE)	Yes	(null)	6	(null)
7	PROJECT_DURATION	VARCHAR2(30 BYTE)	Yes	(null)	7	(null)
8	PROJECT_STATUS	VARCHAR2(30 BYTE)	Yes	(null)	8	(null)
9	LAUNCH_DATE	VARCHAR2(30 BYTE)	Yes	(null)	9	(null)
10	CONTACT_NAME	VARCHAR2(30 BYTE)	Yes	(null)	10	(null)
11	CONTACT_TELEPHONE	VARCHAR2(30 BYTE)	Yes	(null)	11	(null)
12	PROJECT_DESCRIPTION	VARCHAR2(30 BYTE)	Yes	(null)	12	(null)
13	PROJECT_NOTES	VARCHAR2(30 BYTE)	Yes	(null)	13	(null)
14	COMPANYNAME	VARCHAR2(50 BYTE)	Yes	(null)	14	(null)

3.2.7 Proposal

PROPOSALS x						
Columns Data Constraints Grants Statistics Triggers Flashback Dependencies Details Partitions Indexes SQL						
Actions...						
	COLUMN_NAME	DATA_TYPE	NULLABLE	DATA_DEFAULT	COLUMN_ID	COMMENTS
1	ID	NUMBER(10,0)	No	"ASHAIK"."ISEQ\$\$_92692".nextval	1	(null)
2	PROPOSAL_NAME	VARCHAR2(30 BYTE)	Yes	(null)	2	(null)
3	ACCOUNT_MANAGER	VARCHAR2(30 BYTE)	Yes	(null)	3	(null)
4	DATE_ADDED	VARCHAR2(30 BYTE)	Yes	(null)	4	(null)
5	CHANCE_TO_CLOSE	VARCHAR2(30 BYTE)	Yes	(null)	5	(null)
6	ESTIMATED_BUDGET	VARCHAR2(30 BYTE)	Yes	(null)	6	(null)
7	PROPOSAL_DURATION	VARCHAR2(30 BYTE)	Yes	(null)	7	(null)
8	PROPOSAL_AMOUNT	VARCHAR2(30 BYTE)	Yes	(null)	8	(null)
9	TOTAL_REVENUE	VARCHAR2(30 BYTE)	Yes	(null)	9	(null)
10	PROPOSAL_STATUS	VARCHAR2(30 BYTE)	Yes	(null)	10	(null)
11	REJECTION_REASON	VARCHAR2(30 BYTE)	Yes	(null)	11	(null)
12	CONTACT_NAME	VARCHAR2(30 BYTE)	Yes	(null)	12	(null)
13	CONTACT_TELEPHONE	VARCHAR2(30 BYTE)	Yes	(null)	13	(null)
14	PROPOSAL_DESCRIPTION	VARCHAR2(30 BYTE)	Yes	(null)	14	(null)
15	PROPOSAL_NOTES	VARCHAR2(30 BYTE)	Yes	(null)	15	(null)
16	COMPANYNAME	VARCHAR2(50 BYTE)	Yes	(null)	16	(null)

3.2.8 Staff

STAFFT x							
Columns Data Constraints Grants Statistics Triggers Flashback Dependencies Details Partitions Indexes SQL							
Actions...							
	COLUMN_NAME	DATA_TYPE	NULLABLE	DATA_DEFAULT	COLUMN_ID	COMMENTS	
1	ID	NUMBER(10,0)	No	(null)	1	(null)	
2	NAME	VARCHAR2(20 BYTE)	No	(null)	2	(null)	
3	EMAIL	VARCHAR2(20 BYTE)	No	(null)	3	(null)	
4	GENDER	VARCHAR2(20 BYTE)	No	(null)	4	(null)	
5	MOBILE	VARCHAR2(20 BYTE)	No	(null)	5	(null)	
6	CATAGERY	VARCHAR2(20 BYTE)	No	(null)	6	(null)	
7	USERNAME	VARCHAR2(20 BYTE)	No	(null)	7	(null)	
8	PASSWORD	VARCHAR2(20 BYTE)	No	(null)	8	(null)	
9	CONFIRMPASSWORD	VARCHAR2(20 BYTE)	No	(null)	9	(null)	

3.2.9 Timesheet

TIMESHEET x							
Columns Data Constraints Grants Statistics Triggers Flashback Dependencies Details Partitions Indexes SQL							
Actions...							
	COLUMN_NAME	DATA_TYPE	NULLABLE	DATA_DEFAULT	COLUMN_ID	COMMENTS	
1	STAFFID	VARCHAR2(15 BYTE)	No	(null)	1	(null)	
2	INTIME	VARCHAR2(10 BYTE)	Yes	(null)	2	(null)	
3	OUTTIME	VARCHAR2(10 BYTE)	Yes	(null)	3	(null)	
4	ID	NUMBER(10,0)	Yes	(null)	4	(null)	

3.3 Security and Fraud Prevention

There some security and fraud prevention like the most possible cases the data will be backup recovery process will be for every 24 hours and the backup data will be able to store in the specified location. If we need any emergency with our data, the auto backup will help us for the further reference.

3.4 Release and Transition Plan

Every data coming from the data would be able to update the data from the database and at the same time we will be able to view the data after every update which was done by hours' basics.

4 Project Design Description

Html tabs designing forms with css and along with we got know how forms should be designed

Many server controls and how to catch the event args and creating session and how to use session in project and many more things we got know on the while

For retrieving data from data base for that specific identity the session is very much useful

I came across many difficulty's to connect data base from frontend c# program using ado dot net program so, surfed many web sites to clear this problems final here the output..

5 Internal/external Interface Impacts and Specification

In this our main intension was to bring the relationships between the Our aim is to create a relational database for the sales portal which is mainly built with Oracle 12c.

6 Design Units Impacts

Each functional area having the same impact on the design units of the project. The design units will resemblance the same impact on the data base functionality and also as well as the functionality of the frontend programming logic too.

6.1 Subsystems

6.1.1 Functional Overview

The main functionality flow of this application is that whenever any category of the module of above mentioned those will be inserted in to the data base. And whenever they logon with the same credentials then that will be done user will be logoeed in to our application then he can able to access all those corresponding information. The access pages are specific to the category for which they were logged in. In this way every user design have the impact on the functionality that which they were using.

6.1.2 Impacts

There is such cases found while testing the application such that no impact state for every action from the user there corresponding result of impact on the application

6.1.3 Requirements

As of our analysis each requirement of the abstract is satisfied. In the visual studio, we can the below pages when we logged in as staff. Once if we logged in as staff we can be able to view the

details of the clients and at the same time the manager login pages is also. So, if we go through the staff login page we can see the information as given in the below

a) Staff Login

Sign In

Forgot password?

Staff

▼

Username

afrin

Password


●●●●●●|

Sign-in

Don't have an account!

[Sign Up Here](#)

b) General info



Sale Management Portal

afirin Sign-out

Q

Addclient

Filter by ☐ Client ☐ Prospect

gsu

Trylogic solutions

Doablesoft Technologies

gsu

General info

Contacts

Notes

Opportunities

Proposal

Projects

Company Name

gsu

Type

Software

Telephone

7088566426

Industry

sales

Fax

95123657

Website

governors state university

Address

governors state university

Source

Web site

City

university park

CompanyDescription

sales

State

illinois

Zip code

60484

Country

United States

c) Contacts

Q

Addclient

Filter by ☐ Client ☐ Prospect

gsu

Trylogic solutions

Doablesoft Technologies

gsu

General info

Contacts

Notes

Opportunities

Proposal

Projects

First Name

Last Name

Title

Work Phone

Mobile Phone

FAX

E-News

Email

d) Notes

Sale Management Portal

afrrin Sign-out

General info Contacts **Notes** Opportunities Proposal Projects

10-11-2016
Started SMP

12-11-2016
Ongoing

gsu
Trylogic solutions
Doablessoft Technologies
gsu

e) Opportunities

Sale Management Portal

afrrin Sign-out

General info Contacts Notes **Opportunities** Proposal Projects

OpportunityName gsu

AddedBy ravi

DateAdded 19-11-2016

ChanceToClose 19-12-2016

EstimatedBudget 60000

OpportunityDuration one month

OpportunityType Sales

ContactName ravi

ContactTelephone 987456321

OpportunityDescription sales force

OpportunityNotes sales

Update

gsu
Trylogic solutions
Doablessoft Technologies
gsu

f) Proposal

Sale Management Portal | afrin | Sign-out

General info | Contacts | Notes | Opportunities | Proposal | **Projects**

Search:

Add client

Filter by: ☐ Client ☐ Prospect

gsu
Trylogic solutions
Doablessoft Technologies
gsu

ProjectName	GSU	LaunchDate	15/11/2016
ProjectManager	afrin	ContactName	afrin
DateAdded	18/11/2016	ContactTelephone	788974946
ProjectAmount	\$50000	ProjectionDescription	will start
TotalRevenue	\$10000	ProjectsNotes	something
ProjectDuration	six months	<input type="button" value="Update"/>	
ProjectStatus	Going		

g) Projects

Sale Management Portal | afrin | Sign-out

General info | Contacts | Notes | Opportunities | Proposal | **Projects**

Search:

Add client

Filter by: ☐ Client ☐ Prospect

gsu
Trylogic solutions
Doablessoft Technologies
gsu

ProjectName	GSU	LaunchDate	15/11/2016
ProjectManager	afrin	ContactName	afrin
DateAdded	18/11/2016	ContactTelephone	788974946
ProjectAmount	\$50000	ProjectionDescription	will start
TotalRevenue	\$10000	ProjectsNotes	something
ProjectDuration	six months	<input type="button" value="Update"/>	
ProjectStatus	Going		

6.2 Functional Area B/Design Unit B

6.2.1 Functional Overview

In this database, we can be able to maintain the portal to have the database with information of the database about the portal. The database is setup that staff can the right to check the client's information for accepting the project proposal.

6.2.2 Impacts

We don't have any impacts to doing this project.

6.2.3 Requirements

Following are the tables created for the database in Oracle 12c

- a) Announcements
- b) Clients
- c) Contacts
- d) Manager
- e) Notes
- f) Opportunities
- g) Projects
- h) Proposal
- i) Staff
- j) Timesheet

7 Open Issues

No such pending issues are available

8 Acknowledgements

This section should include a reference to prior authors, etc. and others who have assisted in the generation of this document.

9 References

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